



Snapshots from the Journey

Portfolio Guide for the

Experienced

Service Coordinator

Module 6





Description of Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

First contacts with families can set the tone for future relationships between the family and early intervention system service providers. Families must be given the information, support, and opportunity to fulfill their role as full decision-making partners in the early intervention process. This will be evidenced by professionals who demonstrate cultural sensitivity in their relationship with families, professionals who demonstrate flexibility, acknowledging that families have unique needs, professionals who seek to involve families as key decision makers throughout the early intervention process, and professionals willing to collaborate across agency lines for the benefit of the child and family (Addison, S. and Mattheiss, L., 2004). Putting these ideas into practice starts with the initial contact with the family.

This training module is comprised of three parts: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources. Basic adult learning principles are included in an effort to help service coordinators present information to families in ways that will enhance their understanding. Through pre- and post-tests, case examples, role-playing, and other activities, the participant(s) will learn how to gather information in ways that are comfortable and appropriate for families.

Landmarks of the early intervention process are included so service coordinators will be able to accurately inform families of how the system operates. Participants will practice explaining the early intervention system to families using an intake tool and will review forms related to intake and referral.

Participants will complete several outside assignments for this module. An intake field observation will be done, and visits to several key service providers will be completed in order to help the service coordinator learn more about resources available to children and families. Participants will complete an internet research assignment in order to familiarize themselves with prominent state and federal resources as well.



Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

Competencies

- Has knowledge and understanding of principles of adult learning that affect family members as they receive information about the early intervention system.
- Takes into account and respects the various commitments of family members in planning intervention.
- Has the ability to initiate and maintain effective and systematic consultation (communication) with family members and caregivers in a sensitive manner.
- Has knowledge and understanding of how to disseminate information concerning the options for intervention, including financial assistance, to families and other professionals in the community.
- Consults with and refers to other professionals and community agencies.
- Facilitates the movement of all appropriate clients into the intake and screening process.
- Disseminates information throughout the community regarding the availability of services, criteria for eligibility, and methods of referral.
- Demonstrates skill in identifying gaps and overlaps in services provided to children and their families.
- Is willing to act as a representative of TEIS at a variety of community and regional events that include child find and public awareness activities.
- Participates in, conducts, and implements screening and child find programs.
- Exercises procedural safeguards as described in Part C of IDEA.
- Coordinates services to assure that all evaluations and provision of services are performed in a timely manner.
- Demonstrates knowledge and skill in conducting family-directed assessments to determine resources, priorities and concerns of the family and identification of the supports and services necessary to enhance the family's capacity to meet the developmental needs of their infant or toddler.
- Is familiar with resources in the area, and has the ability to assist families in the utilization of community, state, and federal resources to advocate for new or needed services.



Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

Contents

- 6.1 Gathering Information
- 6.2 Routines-Based Interview
- 6.3 Gathering Information Pre-Quiz
- 6.4 Case example — Jack
- 6.5 Ask Mrs. Yonkers
- 6.6 Gathering Information Post-Quiz
- 6.7 Intake & Referral Pre-Test
- 6.8 Intake & Referral
- 6.9 Tennessee's Early Intervention System
- 6.10 Intake Checklists
- 6.11 Form Review
- 6.12 Intake Field Observation Form
- 6.13 TEIS Overview
- 6.14 More Rules for the Road Intake & Referral Post-Test
- 6.15 Building Resources
- 6.16 Building Resources Web Assignment
- 6.17 Building Resources in Everyday Routines, Settings, and Activities
- 6.18 Building Local Resources, Brochures, & Observations



Module 6

Getting to Know the Travelers along the Way Gathering Information, Intake & Referral, and Building Resources

Assignments/Activity	Measure of Achievement
<p>Module Description</p> <p>Note that the contents of this module are divided into three components: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources.</p>	
<p>6.1 Gathering Information PowerPoint</p> <p>View PowerPoint <i>Gathering Information</i> (slides 1-13), engaging in discussion as directed.</p>	<p>Active participation in discussion and activities during PowerPoint as led by the trainer.</p>
<p>6.2 Routines-Based Interview</p> <p>Please read</p> <p>The routines-based interview is a powerful component in the process of intervention planning. If your district/agency chooses to incorporate this model into practice, the trainer will complete the three activities presented here during formal training with the learner(s). Since this will add significant additional time necessary to complete this module, the trainer may choose to complete these activities at a separate training</p>	<p>Independent outside assignment.</p> <p>Review of materials as requested and placement in portfolio.</p>

Assignments/Activity	Measure of Achievement
<p>date and time. The trainer is further cautioned that there are associated practices tied to the routines-based interview, such as the Eco-map, which are not included in this brief activity. To ensure full understanding of this model, please consider the following:</p> <p>Training and technical assistance For keynote presentations, conference sessions, workshops, or site-specific technical assistance, contact Robin McWilliam: Robin.McWilliam@Vanderbilt.edu In addition to Dr. McWilliam, an international network of colleagues, former students and staff, trainers, faculty, and program directors that have experience with Dr. McWilliam's model are available.</p> <p>Service coordinators benefit from learning about the routines-based interview. All participants should complete the following activities independently outside of formal training time for this module if they are not included in formal training as described above.</p> <p>Step 1 Review the content from the article, <i>Functional Intervention Planning: The Routines-Based Interview</i> (6.2a).</p> <p>Step 2 View the video to observe Dr.</p>	

Assignments/Activity	Measure of Achievement
<p>Robin McWilliam as he demonstrates this activity. Video — <i>Routines-Based Interview (RBI)</i> 45-minute video example of an interview for developing an IFSP with a family.</p> <p>Step 3 Review 6.2b <i>Routines-Based Interview Form</i>. Place the above article (Step 1) and form in the portfolio guide after review. If this step is completed during formal training, role-play with the group a brief interview, using the interview form for recording information, and place in portfolio.</p>	
<p>6.3 Gathering Information Pre-Quiz</p> <p>Complete the pre-quiz. Give to trainer upon completion.</p>	<p>Pre-quiz completion.</p>
<p>6.4 Case example — Jack</p> <p>View PowerPoint <i>Gathering Information</i> (slides 14-16).</p> <p>Develop a list of questions that might be used during the conversation with Susan and Gayle at the initial meeting.</p> <p>Record your questions on worksheet 6.4a, and place in portfolio upon completion.</p> <p>View slides 17-24. Participate as directed by the trainer.</p>	<p>Active participation in discussion and activities during PowerPoint as led by the trainer.</p> <p>Satisfactory listing of interview questions on worksheet 6.4, as determined by the trainer. Worksheet placed in portfolio.</p>
<p>6.5 Ask Mrs. Yonkers</p> <p>View PowerPoint <i>Gathering Information</i> (slides 25-28), reading</p>	<p>Active participation and completion of activity as directed by the trainer.</p>

Assignments/Activity	Measure of Achievement
<p>the questions posed. Indicate whether you feel the question is important to ask Mrs. Yonkers.</p> <p>After the participant(s) make their decision, go to slides 29-38 to find out what Mrs. Yonkers thinks.</p>	
<p>6.6 Gathering Information Post-Quiz</p> <p>Complete the post-quiz. Compare your results to your own pre-quiz, and file both in the portfolio.</p>	<p>Improved score on post-quiz, compared to score on pre-quiz.</p>
<p>6.7 Intake & Referral Pre-Test</p> <p>Complete the pre-test.</p>	<p>Completion of pre-test.</p>
<p>6.8 Intake & Referral</p> <p>View PowerPoint <i>Intake and Referral</i> (slides 1-17), engaging in brief discussion as advised.</p>	<p>Active participation in brief discussion as directed by the trainer.</p>
<p>6.9 Tennessee's Early Intervention System</p> <p>Using the <i>Tennessee's Early Intervention</i> flipchart, work in pairs as instructed. One person will play the role of the family member and the other person will play the role of the service coordinator. Practice presenting the information as you would to a family. Switch roles if time allows.</p>	<p>Active participation in activity to the satisfaction of the trainer.</p> <p>*Experienced TEIS service coordinators in the Southeast District may exempt this activity as they have piloted and used this tool in everyday practice.</p>
<p>6.10 Intake Checklists</p> <p>Read the three checklists outside of training. Follow-up with the trainer or appropriate person in your office, if you have questions about these procedures.</p> <p>Think about what you have learned from doing intakes over the years, which might benefit a new service coordinator. Write a</p>	<p>Follow-up with trainer or other appropriate person in the office for resolution of any questions, as needed.</p> <p>Satisfactorily written paragraph verified by the trainer, and included in the portfolio.</p>

Assignments/Activity	Measure of Achievement
<p>brief paragraph describing organizational tips and/or strategies you have used to improve and make more efficient the intake process for you and for families.</p> <p>Place a copy of the paragraph in the portfolio.</p> <p>Your district office/agency may choose to compile these tips for new service coordinators for their review. Tips for locating seemingly nonexistent addresses, ways to deal with pets, pronouncing difficult names, strategies for keeping up with forms, safety recommendations, etc. are all encouraged.</p>	
<p>6.11 Form Review</p> <p>Ask the trainer for clarification on the use of forms related to intake and referral if needed, as the trainer provides a very brief review of each one.</p> <p>For the trainer's approval, choose an example from your case files to place in your portfolio that demonstrates your competency in facilitating the movement of all appropriate clients/children and families through the intake and screening process. Include an example of each form (6.11a-k). Please protect the child and family's privacy by covering the identifying information.</p> <p>If necessary, and at the request of the trainer, meet for further instruction and review of procedures related to any form</p>	<p>Active participation in brief review of forms, as needed.</p> <p>Copies of forms (below) reviewed and approved as acceptable, at the discretion of the trainer, added to the portfolio:</p> <ul style="list-style-type: none"> 6.11a Consent for Evaluation 6.11b Eligibility Documentation 6.11c Professional Verification of Current Diagnosis 6.11d Review of Pertinent Records 6.11e Family Assessment Summary 6.11f Local Education Agency Notification 6.11g Minimal Data 6.11h Central Intake 6.11i Informing & Consent for Early Intervention Services 6.11j Authorization for

Assignments/Activity	Measure of Achievement
identified by the trainer as incomplete or inadequately completed. Following further instruction, resubmit to the trainer a newly completed and improved example demonstrating acceptable completion of form(s) for approval and inclusion in the portfolio.	Procurement and Release of Information for Procurement and Release of Information 6.11k Written Prior Notice (reviewed in Module 4)
6.12 Intake Field Observation Omit for experienced service coordinators.	Omit unless there is a concern.
6.13 TEIS Overview If recommended by the trainer, review PowerPoint <i>TEIS Overview</i> outside of training. See note pages of PowerPoint for suggested dialogue.	Awareness of optional child find and public awareness tool.
6.14 More Rules for the Road Intake & Referral Post-Test Complete the post-test. Compare your performance with your results on the pre-test.	Improvement in number of correct responses based on pre- and post-test results to the satisfaction of the trainer.
6.15 Building Resources View PowerPoint <i>Building Resources</i> (slides 1-5), engaging in brief discussion as directed.	Active participation in brief discussion as directed by the trainer.
6.16 Building Resources Web Assignment It is essential that service coordinators know how to access information and resources of use to families. This assignment will take time to do the appropriate research, and should be done outside of formal training time. Please complete this step: 1. Visit the websites found on assignment sheet <i>Building Resources Assignment</i>	Satisfactory completion of research. Development of the research guide (to be included in the portfolio if completed) is voluntary for experienced service coordinators based on the requirement of the district/agency program coordinator/trainer.

Assignments/Activity	Measure of Achievement
<p>6.16a and update your knowledge of these state and federal programs. Steps 2-4 are voluntary for experienced service coordinators based on the requirement of the district/agency program coordinator/trainer.</p> <ol style="list-style-type: none"> 2. Build a resource guide that you can refer to in your work. List each program, including the name, address, web address, phone number, contact person, and a very brief program summary or description. Your <i>TEIS Directory of Services</i> may be useful in gathering local contact information, where appropriate. 3. Place your information in a folder/notebook (or on index cards in a file box), and give to your trainer/supervisor for their approval. 4. Place a copy of this information in your portfolio. If you choose to keep this information on index cards, a written statement of satisfactory completion of this activity can be placed in your portfolio by your trainer/supervisor. 	
<p>6.17 Building Resources in Everyday Routines, Settings, and Activities</p> <p>Using worksheet 6.17, identify ten specific typical settings in your local area that serve to promote the development and success of</p>	<p>Complete list of ten specific settings that are appropriate for promoting the development of infants and toddlers, county-specific if appropriate.</p>

Assignments/Activity	Measure of Achievement
<p>infants and toddlers. If you are serving multiple counties, try to include examples from each county. Upon completion, share this with your trainer/supervisor, and place a copy in your portfolio.</p>	
<p>6.18 Building Local Resources, Brochures, & Observations</p> <p>Omit assignment for experienced service coordinators.</p>	N/A